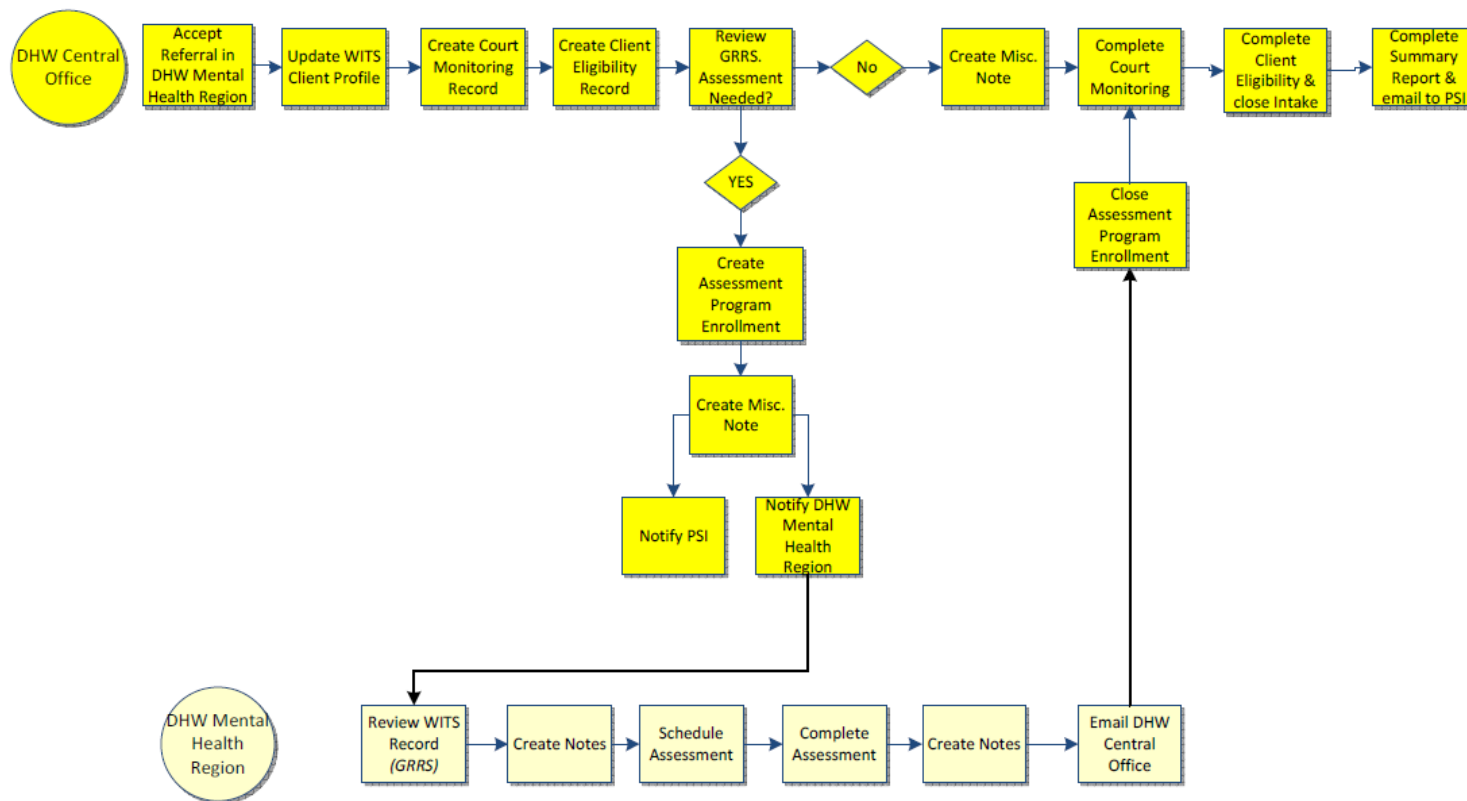


Regional Process for a 19-2524 client who needs an Idaho Mental Health Assessment (IDMHA)

Client Flow

19-2524 Assessment Only Process



A. Review the GRRS.

B. Create notes using the instructions below ([click here for printable instructions](#)).

Creating a Regional 19-2524 Non-Assessment Note



Regions will only select the type of 19-2524 on a note when documenting the time spent on an IDMHA assessment.

Begin on the client activity list.

Home Page

Agency Contacts

▶ Agency

▶ Dispensary

▶ Group List

Clinical Dashboard

▼ Client List

▶ Client Profile

Gain Short Screener

▶ Benefit Application

Linked Consents

Client Contacts

Non-Episode Contact

▼ Activity List

Intake

Client Eligibility

Fee Determination

Court Monitoring

Wait List

▶ Assessments

Diagnosis List

▶ Admission

Program Enroll

▶ ECourt

▶ Encounters

▶ Notes

▶ Treatment

Client Activity List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	7/15/2016	5/13/2013	Completed
	Intake Transaction	7/15/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Assessment Only)	7/20/2016	7/28/2016	Completed
	Mental Health Assessment	7/27/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Concurrent Program)	7/28/2016	7/28/2016	Completed
	Miscellaneous Note Summary	7/28/2016	7/28/2016	Not Applicable
	Court Monitoring Form	7/28/2016	7/28/2016	Completed
	Diagnosis Summary	7/28/2016	7/28/2016	Not Applicable

1. ▶ Notes on the blue navigation pane.

Notes Search

Start Date

8/2/2015

End Date

8/1/2016

Allow Disclosure of Note

Clear

Go

Notes List

Print Notes

Add New Encounter Note

Add New Misc. Note

Actions	Note Type	Date	Duration	Staff	Service/Summary

- Click **Add New Misc. Note** on the right side of the notes list blue bar.



Do not select the type of 19-2524 on a note when documenting the time spent on any activity outside of an IDMHA.



Select the note type that reflects the type of note you are entering.

Miscellaneous Notes

Author Name: Van Skike, Anna
Author Title:
Created Date:

Note Type: Administrative Note
Program: 19-2524 Assessment Only
Frequency:
Summary: Summary Here

Service Date: 8/1/2016
Start Time: 9:00 AM
End Time: 9:15 AM

Duration: 15 Min
Alert: No [Mark Alert](#)
Was Report Sent to State:

Signed Notes

Release these notes? No [Cancel](#) [Save](#) [Finish](#)

Unsigned Notes

[Add Note](#) [Sign Note](#)

3. Select the note type that reflects the information you are documenting. For example, if you are documenting the time it took to schedule an appointment, you could select the type of Administrative Note.
4. **Select the program of 19-2524 Assessment Only.**
5. Complete all other required fields.

Miscellaneous Notes

Author Name: Van Skike, Anna

Author Title:

Created Date:

Note Type

Administrative Note

Service Date

8/1/2016

Duration

15

Min

Program

19-2524 Assessment Only

Start Time

9:00 AM

Alert

No

Mark Alert

Frequency

End Time

9:15 AM

Was Report Sent to State

Summary

Summary Here

Signed Notes

Release these notes?

No

Cancel

Save

Finish

Unsigned Notes

Add Notes

Add Note

Sign Note

6. Enter notes in the Unsigned note section and click

Sign Note

Miscellaneous Notes

Author Name: Van Skike, Anna
 Author Title:
 Created Date:

Note Type: 19-2524 Note Service Date: 8/1/2016 Duration: 15 Min
 Program: 19-2524 Assessment Only Start Time: 9:00 AM Alert: No [Mark Alert](#)
 Frequency: End Time: 9:15 AM Was Report Sent to State:
 Summary: Summary Here
 Signed Notes:
 Signed by Van Skike, Anna, 8/1/2016 4:43:09 PM:
 Add Notes
 Release these notes? No
 Unsigned Notes:
 Add Note Sign Note

Red arrows point to the **Save** and **Finish** buttons.

7. When your note is signed it will move up to the signed note section and will include a date and time stamp. Click **Save** and

Finish

C. Schedule the assessment.

D. Complete the assessment.

E. Create Assessment notes using the instructions below ([click here for printable instructions](#)).

Creating a Regional 19-2524 Assessment Note

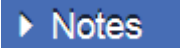


Regions will only select the type of 19-2524 on a note when documenting the time spent on an IDMHA assessment.

Begin on the client activity list.

The screenshot displays the 'Client Activity List' interface. On the left is a blue navigation pane with the following menu items: Home Page, Agency Contacts, Agency, Dispensary, Group List, Clinical Dashboard, Client List (expanded), Client Profile, Gain Short Screener, Benefit Application, Linked Consents, Client Contacts, Non-Episode Contact, Activity List (expanded), Intake, Client Eligibility, Fee Determination, Court Monitoring, Wait List, Assessments, Diagnosis List, Admission, Program Enroll, ECourt, Encounters, Notes (highlighted with a red box and a red arrow), and Treatment. The main area on the right is titled 'Client Activity List' and contains a table with the following data:

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	7/15/2016	5/13/2013	Completed
	Intake Transaction	7/15/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Assessment Only)	7/20/2016	7/28/2016	Completed
	Mental Health Assessment	7/27/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Concurrent Program)	7/28/2016	7/28/2016	Completed
	Miscellaneous Note Summary	7/28/2016	7/28/2016	Not Applicable
	Court Monitoring Form	7/28/2016	7/28/2016	Completed
	Diagnosis Summary	7/28/2016	7/28/2016	Not Applicable

1. Click  on the blue navigation pane.

Notes Search

Start Date

8/2/2015

End Date

8/1/2016

Allow Disclosure of Note

Clear

Go

Notes List

Print Notes

Add New Encounter Note

Add New Misc. Note

Actions	Note Type	Date	Duration	Staff	Service/Summary

- Click **Add New Misc. Note** on the right side of the notes list blue bar.



Regions will only select the type of 19-2524 on a note when documenting the time spent on an IDMHA assessment.

The screenshot shows a web form titled "Miscellaneous Notes". At the top, it displays "Author Name: Van Skike, Anna" and "Author Title:". Below this is a "Created Date:" field. The form contains several dropdown menus and text fields. A red rectangle highlights the "Note Type" dropdown (set to "19-2524 Note"), the "Program" dropdown (set to "19-2524 Assessment Only"), and the "Summary" text field. Two red arrows point upwards from the "Signed Notes" section towards the "Program" and "Summary" fields. Other fields include "Service Date", "Start Time", "End Time", "Duration", "Alert" (set to "No"), and "Was Report Sent to State". At the bottom right, there are buttons for "Add Note" and "Sign Note".

3. Select the note type of 19-2524 Note.
4. **Select the program of 19-2524 Assessment Only.**
5. Complete all other required fields.

Miscellaneous Notes

Author Name: Van Skike, Anna
Author Title:
Created Date:

Note Type: 19-2524 Note Service Date: 8/1/2016 Duration: 15 Min
Program: 19-2524 Assessment Only Start Time: 9:00 AM Alert: No [Mark Alert](#)
Frequency: End Time: 9:15 AM Was Report Sent to State:
Summary: Summany Here
Signed Notes:

Release these notes? No [Cancel](#) [Save](#) [Finish](#)

Unsigned Notes: Add Notes

[Add Note](#) [Sign Note](#)

6. Enter notes in the Unsigned note section and click [Sign Note](#).

Miscellaneous Notes

Author Name: Van Skike, Anna
 Author Title:
 Created Date:

Note Type: 19-2524 Note Service Date: 8/1/2016 Duration: 15 Min
 Program: 19-2524 Assessment Only Start Time: 9:00 AM Alert: No Mark Alert
 Frequency: End Time: 9:15 AM Was Report Sent to State:
 Summary: Summary Here
 Signed Notes:
 Signed by Van Skike, Anna, 8/1/2016 4:43:09 PM:
 Add Notes
 Unsigned Notes:
 Release these notes? No Cancel Save Finish
 Add Note Sign Note

7. When your note is signed it will move up to the signed note section and will include a date and time stamp. Click  and



F. Send a notification to DHW Central Office (outside of WITS).